

The Redtail Financial Group Rundown

Redtail Financial Group

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First quarter tips to help start 2025 strong

The start of a new year is the perfect time to take stock of your finances and help set yourself up for success. Here are five tips to help you kick off 2025 with confidence:

1. Review your budget

Look back at your 2024 spending and adjust for the new year. Prioritize essentials, savings and debt repayment, and don't forget to budget for what brings you joy.

2. Set savings goals

Whether you're building an emergency fund or saving for a big purchase, commit to making consistent contributions to your savings. Even small increases can make a big difference.

3. Tackle debt

Review what you owe and choose a strategy—paying off high-interest debt first (avalanche method) or

tackling small balances for quick wins (snowball method).

4. Update your plans

If you've had any major life changes, make sure your insurance, beneficiaries, and financial plans are up to date. A quick review now can help avoid headaches later.

5. Commit to your future

Develop simple habits like automating savings, increasing retirement contributions and tracking progress. Small steps now may lead to big rewards later.

Take a few moments to reset your financial focus and help set the tone for a successful year ahead. If you'd like personalized support, Redtail Financial Group is here to help. Let's make 2025 a year of progress and confidence.

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Congratulations, Sara!

We're thrilled to share that Sara Grogan has earned her Life and Health Insurance license and is stepping into a new role as our insurance associate. She will remain your go-to for scheduling and questions, while also becoming the main contact for insurance.



Insurance Associate
Sara Grogan

Sara works alongside Financial Advisors John Roesinger and Vicki Lilley, and she is ready to help you explore your insurance options with confidence. Most importantly, she is now even better equipped to help you protect what matters most—your health, family and future.

Join us in congratulating Sara on this exciting achievement. We're so proud to have her on our team, making a difference for clients every day.

Redtail Financial Group recipe

A sweet tradition

Indulge in a little sweetness with a cherished family recipe straight from Sara's kitchen. This **homemade chocolate sauce** is perfect for ice cream, brownies or a cozy cup of hot cocoa.



Ingredients

- Light Karo Syrup (16 ounces)
- Two semi-sweet chocolate baking squares
- Vanilla extract
- Salt

Directions

1. Pour syrup into pan and add two baking squares.
2. Slowly melt the chocolate and be careful to not let it boil.
3. Remove mixture from stove and add a capful of vanilla and a pinch of salt.
4. Mix with an electric hand mixer until it does not separate.
5. Pour chocolate syrup back into Karo bottle for storage.
6. Enjoy warm or at room temperature over ice cream or by the spoonful!

Buzzing through challenges: John Roesinger's (not so) sweet journey with beekeeping

John's first honey harvest was severely impacted by the lack of rain through the summer and into the fall. Since there was very little pollen, most of the honey frames were left in the hive for bee food during the winter.

John will be expanding the hives from two to four next season. Please remember, dandelions and clovers are early pollen for bees to forge and start a strong hive, so don't use lawn chemicals that kill their needed food.



Winter happenings



Tails of winter: Office Professional Becky Dawson-Davis's rescue cats, TNR (trap neuter release) triumphs and a holiday show selfie with Eric (their first!).



From hockey rinks to holiday cheer: Sara Grogan's recent family adventures.



Rugged trails to breathtaking views: Marketing Coordinator Jen Carelli exploring the wild west this winter.



Holiday moments to cherish: Financial Advisor Vicki Lilley and her family celebrating together in South Carolina.



Inspiring excellence

This winter, Vicki Lilley was named 2024 Businesswoman of the Year by BW NICE at the Bucks County Chapter's Third Annual Red Shoe Event. Vicki's dedication to her clients, community involvement and unwavering commitment to excellence have earned her this well-deserved recognition. We are so proud to have her on our team, and we're excited to see what she accomplishes next.

Nominations were submitted independently by the public. Of the professionals nominated, one was selected as Business Woman of the Year. Nominees represented a variety of industries. Nominations were submitted by email to the selection committee at bnicebucksnominations@gmail.com. Nominees were selected based on the quality of the nomination, not the quantity of nominations. Nominations were sent to a judging committee. Judges considered the nominee's professional accomplishments, demonstrated leadership, community impact and philanthropic involvement and alignment with the values of Business Women Networking Involving Charity & Education – Bucks County Chapter and active participation in the organization as well as contributions to the organizations mission. The committee debated on the nominee's merits until a consensus was reached. Nominee did not pay a fee, and there was no fee to apply or be considered for the award. Thrivent and its affiliates did not play a role in the screening or selection process.

Connecting through community

From meaningful conversations to shared laughs, our events are all about connecting with our community. This winter, we chatted about financial and estate planning, healthcare and divorce. We made cemeterrariums and candles and shared good food and wonderful company.

[Check out our website](#) or scan the QR for upcoming events and join in the fun.



Here's a peek at our winter events.

Stay connected

Our websites feature financial insights, appointment request links, events and more. Like us on Facebook for a good balance of fun, family and educational posts.

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Advice | Investments | Insurance | Banking | Generosity

No products will be sold at these events.

Not all team members may office at the above addresses.

Not all team members can provide all products, programs and services in all states.

Thrivent provides advice and guidance through its Financial Planning Framework that generally includes a review and analysis of a client's financial situation. A client may choose to further their planning engagement with Thrivent through its Dedicated Planning Services (an investment advisory service) that results in written recommendations for a fee.

Thrivent is the marketing name for Thrivent Financial for Lutherans. Insurance products issued by Thrivent. Not available in all states. Securities and investment advisory services offered through Thrivent Investment Management Inc., a registered investment adviser, member FINRA and SIPC, and a subsidiary of Thrivent. Licensed agent/producer of Thrivent. Registered representative of Thrivent Investment Management Inc. Thrivent.com/disclosures.

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